Alberta Tourism Market Monitor

Federal Budget 2017 shows commitment to tourism industry

The Federal budget announced in March contains encouraging news for the tourism industry.

Starting in 2018-19, Parks Canada will receive $364 million over two years for the continued management of national parks, marine conservation areas and national historic sites.

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This is good news for national parks in Alberta, which have experienced consistent growth in visitation over the past five years. Attendance at all five national parks in Alberta totalled approximately 6.8 million visitors in 2016, including a 3.6% increase in Jasper National Park to a solid 12.9% increase in Waterton Lakes National Park.

The upward trend in visitation is set to continue this year with all national parks offering free entry to help celebrate Canada's 150th anniversary. The Parks Canada funding announcement is well timed and important to maintaining Alberta's standard for providing a world-class visitor experience. The federal budget also included $30 million over five years, starting in 2017-18, to complete the Trans Canada Trail.

To help improve tourism data collection and analysis, the Federal budget also includes permanent funding for Destination Canada, the country's national tourism marketing organization, starting in 2018-19. The Federal Government has also committed an additional $13.6 million over five years to broaden Statistics Canada's data collection capabilities, and $2.7 million in continuing funding after this period. This funding will enhance Statistics Canada's International Travel Survey Program resulting in better data at more detailed geographic levels.

2016 /17 Alberta Tourism Market Monitor
Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2017 (000's of arrivals and departures) [1]													
Edmonton International Total	569.1p	547.0p											1,116.1p
Per cent change from 2016	1.2%	-1.3%											0.0%
Domestic	423.9p	410.0p											833.9p
Per cent change from 2016	5.0%	3.0%											4.5%
Transborder	84.7p	83.4p											168.1p
Per cent change from 2016	-12.7%	-12.4%											-12.5%
International	60.5p	53.7p											114.2p
Per cent change from 2016	-7.4%	-12.1%											-9.7%
Calgary International Total	1,219.6p												1,219.6p
Per cent change from 2016	1.0%												1.0%
Domestic	815.3p												815.3p
Per cent change from 2016	0.2%												0.2%
Transborder	237.9p												237.9p
Per cent change from 2016	0.6%												0.6%
International	166.5p												166.5p
Per cent change from 2016	5.5%												5.5%
Fort McMurray International Total	58.1p												58.1p
Per cent change from 2016	-14.5%												-14.5%
Highway Count 2017 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.7												57.7
Per cent change from 2016	1.1%												1.1%
Hwy 1 - Banff Pk Gate (2-way)	538.7												538.7
Per cent change from 2016	-0.6%												-0.6%
Hwy 16 - Jasper Pk Gate (2-way)	89.8												89.8
Per cent change from 2016	-0.3%												-0.3%
Hwy 16 - Blackfoot w-bound	143.9												143.9
Per cent change from 2016	0.0%												0.0%
National Park Attendance (000's of visitors) 2016 [3] Does not include Group Tours													
Banff	196.6	212.2	239.1	242.6	300.5	349.5	680.4	659.5	475.2	142.0	131.5	146.4	3,775.5
Per cent change from 2015	6.3%	12.5%	17.3%	-1.7%	1.4%	7.2%	7.9%	4.5%	9.7%	-2.6%	12.7%	-1.2%	6.3%
Jasper	51.0	55.2	71.6	140.3	180.3	211.3	468.2	453.1	319.4	56.1	43.3	49.8	2,099.6
Per cent change from 2015	-3.4%	3.0%	11.7%	-4.6%	1.2%	5.2%	8.1%	1.8%	7.7%	-8.2%	4.3%	-5.5%	3.6%
Waterton Lakes	8.5	11.5	13.1	19.6	41.9	80.0	130.7	122.3	69.6	20.0	13.2	8.1	538.5
Per cent change from 2015	26.9%	53.3%	40.9%	32.4%	6.9%	8.8%	14.3%	7.2%	16.6%	-9.0%	67.1%	1.3%	12.9%
Elk Island	13.8	16.2	19.4	27.9	36.0	40.1	54.1	52.8	38.1	20.1	14.3	12.3	345.1
Per cent change from 2015	43.8%	79.7%	31.2%	42.9%	-8.6%	11.2%	29.0%	10.3%	20.1%	-18.6%	-28.1%	-4.7%	12.3%
Wood Buffalo	n/a	n/a	n/a	0.05	0.50	0.54	0.95	0.81	0.40	0.02	0.02	0.01	3.29
Per cent change from 2015	n/a	n/a	n/a	193.8%	42.9%	27.4%	8.3%	-18.8%	13.8%	-32.4%	63.6%	-58.3%	6.8%
Employment (000's of persons) 2017 Seasonally Adjusted [4]													
Accommodation and Food Services	143.8p												143.8p
Per cent change from 2016	4.4%												4.4%

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada, and Statistics Canada.

Accommodation Indices for Major Regions 2016[4]

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	49.7%	59.0%	61.0%	60.7%	74.7%	61.8%	59.2%	60.1%	60.2%	60.2%	60.1%	45.0%	59.3%
Point change from 2015	-5.0	-6.7	-6.2	-7.3	10.5	-8.0	-5.7	-4.1	-4.4	-2.6	-1.9	-2.7	-3.7
Average Daily Room Rate	$128.02	$131.88	$131.91	$130.77	$124.87	$130.17	$127.5	$127.57	$128.14	$131.27	$134.32	$129.16	$130.01
Variance from 2015	-5.0%	-4.3%	-5.0%	-4.9%	-8.6%	-7.0%	-4.5%	-4.9%	-6.9%	-4.1%	-2.7%	-1.5%	-4.7%
Revenue per available room	$63.58	$77.83	$80.46	$79.38	$93.28	$80.51	$75.43	$76.63	$77.18	$79.04	$80.79	$58.14	$77.08
Calgary Occupancy Rate	45.8%	50.9%	53.5%	56.4%	63.2%	67.8%	78.1%	70.8%	67.5%	55.6%	53.3%	40.6%	58.6%
Point change from 2015	-9.4	-11.1	-10.2	-8.3	-6.5	-2.3	0.0	-5.0	-3.0	-7.6	-1.4	-3.9	-5.8
Average Daily Room Rate	$138.84	$138.98	$137.57	$142.24	$139.55	$157.87	$167.43	$136.14	148.33	$141.19	$145.72	$127.62	$145.55
Variance from 2015	-10.4%	-10.7%	-12.1%	-8.6%	-12.1%	-7.7%	-8.2%	-7.4%	-5.7%	-9.1%	-5.1%	-7.4%	-8.0%
Revenue per available room	$63.63	$70.69	$73.65	$80.23	$88.23	$107.03	$130.71	$96.42	$100.19	$78.51	$77.73	$51.80	$85.22
Alberta Resorts Occupancy Rate	42.5%	53.9%	55.4%	46.8%	63.5%	83.4%	93.1%	93.9%	87.5%	57.4%	41.4%	44.8%	64.1%
Point change from 2015	1.6	0.5	5.6	-1.6	3.4	6.5	2.5	1.9	5.3	-1.3	3.5	-5.0	1.8
Average Daily Room Rate	$184.26	$195.28	$195.40	$180.42	$213.16	$279.58	$335.54	$332.47	$283.97	$203.64	$184.25	$265.16	$252.68
Variance from 2015	0.9%	10.7%	14.3%	5.8%	7.0%	9.1%	15.5%	12.3%	10.3%	7.4%	10.7%	10.4%	10.1%
Revenue per available room	$78.40	$105.22	$108.31	$84.36	$135.40	$235.58	$312.41	$312.04	$248.52	$116.94	$76.25	$118.87	$161.89
Other Alberta** Occupancy Rate	35.3%	39.6%	40.4%	39.2%	42.4%	48.3%	51.6%	52.1%	50.2%	45.5%	43.6%	33.2%	43.3%
Point change from 2015	-17.1	-15.9	-12.7	-9.8	-8.7	-10.3	-6.9	-4.8	-5.4	-5.0	-2.0	-0.2	-8.3
Average Daily Room Rate	$122.20	$123.10	$120.47	$116.27	$113.49	$123.76	$123.52	$121.13	$118.23	$116.45	$117.56	$113.29	$119.30
Variance from 2015	-9.0%	-7.8%	-8.3%	-10.4%	-10.7%	-3.7%	-4.5%	-5.9%	-7.5%	-7.6%	-7.2%	-6.7%	-7.5%
Revenue per available room	$43.09	$48.69	$48.70	$45.62	$48.15	$59.78	$63.74	$63.07	$59.37	$52.98	$51.29	$37.57	$51.60
Total Alberta (excl. Resorts) Occupancy Rate	42.4%	48.3%	49.9%	50.3%	57.6%	58.0%	61.7%	60.0%	58.2%	52.6%	51.2%	38.7%	52.3%
Point change from 2015	-11.5	-12.1	-10.4	-8.8	-2.8	-7.2	-4.5	-4.6	-4.3	-5.2	-1.8	-2.0	-6.3
Average Daily Room Rate	$129.50	$131.06	$129.79	$129.88	$126.09	$137.81	$141.35	$128.30	$131.68	$129.03	$132.01	$123.03	$131.51
Variance from 2015	-8.0%	-7.5%	-8.5%	-7.7%	-10.5%	-5.4%	-5.2%	-6.1%	-6.3%	-7.1%	-4.8%	-5.3%	-6.6%
Revenue per available room	$54.94	$63.24	$64.82	$65.35	$72.64	$79.94	$87.26	$76.97	$76.70	$67.86	$67.60	$47.66	$68.81

Accommodation Indices for Selected Cities or Towns 2017[4]

Occ% = Occupancy Rate
ADR= Average Daily Room Rate
RevPar= Revenue Per Available Room

	January			Year-To-Date				January			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
Airdrie	27.9%	$95.43	$26.63	27.9%	$95.43	$26.63	Banff	53.4%	$168.75	$90.10	53.4%	$168.75	$90.10
Bonnyville	29.2%	$107.98	$31.49	29.2%	$107.98	$31.49	Canmore	31.3%	$110.43	$34.55	31.3%	$110.43	$34.55
Drayton Valley	46.1%	$110.92	$51.18	46.1%	$110.92	$51.18	Drumheller	19.0%	$121.00	$23.03	19.0%	$121.00	$23.03
Edson	57.5%	$111.51	$64.07	57.5%	$111.51	$64.07	Fort Mac	44.2%	$145.84	$64.40	44.2%	$145.84	$64.40
Fort Saskatchewan	23.8%	$112.40	$26.79	23.8%	$112.40	$26.79	Gr. Prairie	51.2%	$123.50	$63.17	51.2%	$123.50	$63.17
High Level	54.2%	$123.30	$66.82	54.2%	$123.30	$66.82	Hinton	30.5%	$95.47	$29.13	30.5%	$95.47	$29.13
Innisfail	25.7%	$81.52	$20.96	25.7%	$81.52	$20.96	Jasper	42.7%	$165.61	$70.72	42.7%	$165.61	$70.72
Leduc	44.5%	$99.77	$44.38	44.5%	$99.77	$44.38	Lethbridge	36.1%	$108.26	$39.05	36.1%	$108.26	$39.05
Lloydminster	33.3%	$114.26	$38.05	33.3%	$114.26	$38.05	Med. Hat	38.1%	$109.51	$41.74	38.1%	$109.51	$41.74
Nisku	53.3%	$98.76	$52.60	53.3%	$98.76	$52.60	Red Deer	31.0%	$99.87	$30.99	31.0%	$99.87	$30.99
Sherwood Park	34.1%	$123.07	$41.99	34.1%	$123.07	$41.99	Whitecourt	54.2%	$110.41	$59.81	54.2%	$110.41	$59.81
Total Alberta	42.4%	$132.70	$56.20	42.4%	$132.70	$56.20							

Sources: CBRE Hotels Trends in the Hotel Industry National Market Report and STR Inc.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Food Services and Drinking Places 2016 ($ Millions) unadjusted[7]													
Total Receipts for Alberta	671.64r	663.95r	730.00r	742.74r	774.33r	753.86r	774.81r	778.74r	752.70r	760.25r	**747.80r**	**746.00p**	**743.52p**
Per cent change from 2015	-2.6%	0.9%	-1.5%	1.7%	0.4%	-0.3%	-1.3%	0.5%	1.5%	0.1%	**2.4%**	**0.7%**	**0.4%**
Historic Sites and Museums 2017 (000's of visitors) [9]													
Visitor Attendance***	10.5p												10.5p
Per cent change from 2016	-0.9%												-0.9%
Exchange Rates 2017[8]													
Canadian Dollar/U.S. Dollar (noon)	0.76	**0.76**											**0.76**
Canadian Dollar/ Euro	0.71	**0.72**											**0.72**
Canadian Dollar/ Great British Pounds	0.61	**0.61**											**0.61**
Oil Price: Western Texas Intermediate (WTI) 2017[10]													
Cushing, OK Spot Price (US Dollar per Barrel)	52.5	**53.47**											**52.99**
Major Tourism Projects Valued $5 million or Greater 2017 ($ Millions)[11]													
Total Value of Hotel Projects Inventory	**$666**												**$666**

Sources: Statistics Canada, Alberta Culture and Tourism, Bank of Canada, WTI, Government of Alberta.

*Commercial Air Service suspended from May 5-June 10 due to wildfire

**Other Alberta includes Lethbridge, Red Deer, and other Alberta communities.

***Please note some of the historical sites have changed their hours of operation - see Notes section for details.

Note: New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. From September 2015, total domestic passengers at Fort McMurray International Airport has been added.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport websites.

2. Highway Traffic: These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year to date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. Tour group data is included in the annual edition of Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay, profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices for Major Regions - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca

6. Accommodation indices for Selected Cities or Towns - Destination reports are publications of Smith Travel Research Inc. (STR). Terms and conditions governing the ownership, distribution and use of these Destination Reports and their contents include that no historic data can be published, only current month and year-to-date data.
Source: STR Inc.

7. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

8. Historic Sites and Museums - Visitor attendance figures are monthly totals based on 15 historic sites, the Royal Tyrrell Museum of Paleontology and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015.
Source: Alberta Culture and Tourism

9. Exchange Rate - this is the average monthly exchange rate.
Source: Bank of Canada.

10. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

11. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta, http://majorprojects.alberta.ca/

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